



THE CITY OF SAN DIEGO

# Preliminary Review

CITY OF SAN DIEGO DEVELOPMENT SERVICES  
1222 FIRST AVENUE, MS 301, SAN DIEGO, CA 92101-4153  
Call (619) 446-5300 for appointments and (619) 446-5000 for information.

INFORMATION  
BULLETIN  
**513**  
May 2004

This information bulletin describes a service we offer to our customers, called Preliminary Review. This service helps you obtain the answers that you need to determine the feasibility of your development project and to be successful in submitting the project for review.

Before considering the preliminary review service, you should begin your project planning by completing a Parcel Information Checklist (DS-302). This checklist is an important tool which will assist you in determining the City of San Diego's planning and zoning regulations that apply to your project. By evaluating this information prior to designing your project, you can avoid mistakes early in the process, save time, and reduce processing costs. For additional information see Land Development Manual, Section 1: Guide to the Project Submittal Process.

You may also obtain information from our Development and Permit Information staff (appointments recommended). The Development and Permit Information team has the resources available to determine the regulations applicable to your property and proposed development, to identify your property's zoning, to answer general land use and building code (electrical, mechanical, fire, etc.) questions, and to help you complete the Parcel Information Checklist. They can also help you evaluate your options of requesting preliminary review service or going directly to formal submittal based upon the nature and complexity of your project, and to understand the documents you need to submit for whatever service choice you make. For more information on the services provided by Development and Permit Information, see Information Bulletin 109.

## I. PRELIMINARY REVIEW

Through preliminary review, you can obtain general information on the regulations with which your project must comply, find out which permits you must obtain, the review process that applies to your development, and obtain interpretations on how the City will apply code provisions to specific situations. Staff responses to your specific questions will be documented. Preliminary Review is not a comprehensive plan review, nor is it intended to replace the services provided by design professionals (architects, engineers, land use attorneys, code consultants, etc.). The service is tailored to your specific project information needs and your knowledge of the City's development requirements and processes. Preliminary Review is a limited service, and staff have a fixed number of hours to answer your questions.

## Documents referenced in this Information Bulletin

- Information Bulletin 109, Development and Permit Information
- Parcel Information Checklist (DS-302)
- Land Development Manual, Project Submittal Requirements

The information provided to you during preliminary review is valid for one year from the date of the correspondence, except if 1) the code on which this information is based is changed; 2) emergency legislation is enacted by City Council; or 3) there is a change in the project scope. Our goal is to give you the information you need to make informed decisions about how to proceed with the design of your project.

Preliminary Review is a voluntary, fee-based service. This service is offered prior to your formal submittal to the City for required permits and reviews. You will need to formally submit plans to Development Services for a complete plan review and approval before permit issuance.

## II. PRELIMINARY REVIEW OPTIONS

There are two Preliminary Review options:

### A. Single Discipline Preliminary Review

When your questions are best answered by only one discipline, your project could be a candidate for single discipline preliminary review. For example, steep hillside issues would be addressed by Planning Review; means of egress by Structural; grading permits by Engineering Review, etc. The Preliminary Review Questionnaire and all documents will be taken in and routed to the discipline(s) based upon your specific policy questions and interpretations listed in item C.14 and your response to Part D of the Questionnaire. When listing your specific questions in item C.14, keep in mind that Preliminary Review is a limited service, is not a plan check, and staff have a fixed number of hours to answer your questions.

If your questions involve more than one discipline, you have the option of submitting separate Questionnaires for each discipline. Keep in mind that single discipline preliminary review does not include coordination of review between disciplines. You will be required to pay a single discipline preliminary review fee for each single discipline preliminary review.

Your project will then be assigned to a reviewer who will prepare a written response to your questions within five working days. Additional charges and extended review times will be applied for more com-

plex projects. The discipline supervisor will contact the applicant to inform them of additional fees and extended turnaround times for these complex projects.

### **B. Multiple Discipline Preliminary Review**

When your questions and the information requested involve more than one discipline for review, the project is considered a multiple discipline preliminary review, where coordination of the review between disciplines is requested. A Development Project Manager is assigned to all applications submitted for multiple discipline preliminary review.

Based upon the information you provide and the specific questions you ask on the attached Preliminary Review Questionnaire, the Development Project Manager coordinates the staff team from the most appropriate staff to fulfill the needs of your Preliminary Review. The Development Project Manager will coordinate the reviewer's written responses to your specific issues and forward them to the applicant within 15 working days of the submittal date. The response will include submittal requirements, schedules and processing costs, as appropriate for your project.

## **III. PRELIMINARY REVIEW MEETING**

Additionally, you may request a preliminary review meeting with reviewer(s) to discuss the results of the preliminary review. For single discipline preliminary reviews, an additional fee is required for this meeting, based upon an hourly rate of \$110.00 for each staff person requested to attend the meeting. This request may be made upon submittal of the preliminary review or after having received the preliminary review written response.

The assigned Development Project Manager or staff reviewing your preliminary review will contact the applicant within 5 working days of the date of your submittal to schedule a meeting. At this meeting, the results of the preliminary review will be presented and you will be offered the opportunity to get clarification on the preliminary review issues. Additional questions that could not be addressed at the preliminary review meeting may require another preliminary review submittal. The applicant will receive written documentation of the results of the meeting within 5 working days of the meeting.

## **IV. WHAT DO I NEED TO SUBMIT FOR PRELIMINARY REVIEW?**

Appointments for submittal are recommended and can be made by calling (619) 446-5300. Walk-in services are also available. Check in at the Development Services Center, 3rd floor, 1222 First Avenue. At Project Submittal, you will be asked to provide the following:

### **❑ Preliminary Review Questionnaire**

### **❑ Documents**

Submit any documents that you believe will help staff to understand your proposed development and the current condition of your property (see Item G of the Questionnaire for suggestions). The completeness and depth of our response to your specific information requests will depend largely on the amount and detail of the information that you provide to us. It will benefit your preliminary review if you carefully consider the information you are seeking and adjust the documents and level of detail provided accordingly (e.g., for exiting questions, provide a fully dimensioned and detailed exiting analysis). Plans with less than 20 sheets must be folded as individual sheets to 8 1/2" x 11"; plans with more than 20 sheets may be tri-folded.

### **❑ Fee/Deposit**

### **❑ Copies**

When you are requesting a single discipline preliminary review, you only need to submit two sets of documents with the Preliminary Review Questionnaire. Submit a minimum of **twelve (12) copies** of the completed questionnaire and documents you deem necessary for multiple discipline preliminary review. In limited situations, additional copies may be required. Where this is required, staff assigned to your project will contact you directly to secure the additional copies.

## **V. FEE/DEPOSIT**

### **A. Multiple Discipline Preliminary Review**

The preliminary review involving multiple review disciplines requires a deposit into a Trust Fund account. This account is established with an initial deposit of \$2,000. This initial deposit is drawn against to pay for the preliminary review of your project. During project review, the Financially Responsible Party (as identified in item B of the Preliminary Review Questionnaire) may receive invoices for additional deposits for subsequent preliminary reviews of the project in order to maintain a minimum \$1,000 balance. At the end of the project, any remaining funds will be returned.

### **B. Single Discipline Preliminary Review**

For single discipline preliminary review, a fee of \$467 will be collected at project submittal. Reviews exceeding 4-hours will be invoiced an additional hourly fee after consulting with the applicant.

### **C. Mapping Fee**

This fee is charged when there are plans, drawings, maps or other geographical documents utilized for project review.

Mapping Fee ..... \$ 10



City of San Diego  
Project Management  
**Development Services**  
Development Services Center 1222 First Ave., MS - 302  
San Diego, CA 92101-4153  
Appointments (619) 446-5300, Information (619) 446-5000

## Preliminary Review Questionnaire

Project No.

Below is typical information needed for preliminary review. Detailed and specific information provided will facilitate the project review process. It is **MANDATORY** to complete the following and, if not applicable, please indicate N/A. Incomplete information will delay processing of your request. Please print legibly or type. Attach additional sheets if necessary.

**Review Type:** ☐ Single Discipline Preliminary Review ☐ Multiple Discipline Preliminary Review  
I ☐ would ☐ would not like a preliminary review meeting with staff prior to written responses to my issues.

### A. APPLICANT INFORMATION

Name:

Company:

Address:

City:

State:

ZIP Code:

Telephone Number:

FAX Number:

Internet Address:

### B. FINANCIALLY RESPONSIBLE PARTY (COMPLETE FOR MULTIPLE DISCIPLINE PRELIMINARY REVIEW ONLY)

Name/Firm Name:

Address:

City:

State:

Zip Code:

Telephone:

Fax No.:

**Financially Responsible Party Declaration:** I understand that City expenses may exceed the estimated advance deposit and, when requested by the City of San Diego, will provide additional funds to maintain a positive balance. Further, the sale or other disposition of the property does not relieve the individual or Company/Corporation of their obligation to maintain a positive balance in the trust account, unless the City of San Diego approves a Change of Responsible Party and transfer of funds. Should the account go into deficit, all City work may stop until the requested advance deposit is received.

Print Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature\* \_\_\_\_\_ Date: \_\_\_\_\_

\*The name of the individual and the person who signs this declaration must be the same. If a corporation is listed, a corporate officer must sign the declaration (President, Vice-President, Chairman, Secretary or Treasurer)

**C. GENERAL PROJECT INFORMATION**

1. Project Address: \_\_\_\_\_

2. Assessor's Parcel Number(s) (APN): \_\_\_\_\_ Parcel Size: \_\_\_\_\_

3. Legal Description: \_\_\_\_\_

4. Existing Use: \_\_\_\_\_

5. Proposed Use (Check all that apply): ☐ Single Dwelling ☐ Multiple Dwelling (no. of units \_\_\_\_\_)  
☐ Commercial ☐ Industrial ☐ Scientific Research ☐ Office ☐ Other: \_\_\_\_\_

Describe the use:

\_\_\_\_\_

6. Project Description:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

7. Describe Project Background (what and when was the last development activity on the site)?

\_\_\_\_\_

\_\_\_\_\_

8. List all permits/approvals related to the project (e.g., board of appeals approvals, lot tie agreements, easement agreements, building restricted easements, development permits, policy approvals, subdivision approvals, or other special agreements with the city), if any:

\_\_\_\_\_

\_\_\_\_\_

9. Does the project include new construction? ..... ☐ Yes ☐ No

If Yes, what is the proposed Height/Number of Building Stories: \_\_\_\_\_

10. Does the project include an interior remodel (tenant improvement)? ..... ☐ Yes ☐ No

11. List any requested permits, actions or approvals:

\_\_\_\_\_

\_\_\_\_\_

12. Are you requesting a determination on whether the site has potential historic resources? ..... ☐ Yes ☐ No

If this is your only request, you do not need to complete the rest of this Questionnaire. Stop here and provide the following:

- a. Photographs of the site, including each building facade, with the street address clearly visible; details of windows, siding and eaves; and streetscape views.
- b. Records of building permits which affected the exterior of the structure .
- c. Assessor Building Record from the County of San Diego.
- d. In lieu of 12.a. thru 12.c above, a site specific historic survey may be provided.

13. Are you requesting a "Will Serve Letter" (a commitment letter from the City of San Diego to provide water and wastewater service)? ..... ☐ Yes ☐ No

For which service? ☐ water ☐ wastewater If the "Will Serve Letter" is your only request, you do not need to complete the rest of this Questionnaire.

14. List specific policy questions, issues, or items needing clarification (attach a separate sheet, if necessary). Please include all supporting and necessary documents to enable staff to respond to your question (plans, calculations, reports, surveys, analysis, etc. See item G of this Questionnaire for additional suggestions.)

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15. What is your proposed schedule, from formal plan submittal to project approval?

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#### **D. SINGLE DISCIPLINE PRELIMINARY REVIEW**

A brief explanation of the Development Services Department and some Planning Department Divisions areas of plan review responsibility is provided below. Please use this information to determine which discipline(s) you would like to answer your specific questions, issues or items needing clarification. Project Submittal staff will distribute the review based upon your response to item C.14 and Part D of this questionnaire.

☐ **Combined Review:** Reviews projects for water and sewer requirements; compliance with Land Development Code requirements for City-wide zones (see also Planning Review); energy conservation requirements for single family residences, and building permit fee estimates.

☐ **Community Planning:** Reviews discretionary projects for consistency with policy documents (e.g., Community Plan, Local Coastal Plan, General Plan, etc.).

☐ **Drainage & Grades:** Reviews ministerial grading and public right-of-way projects for conformance with policies and standards.

☐ **Electrical:** Reviews construction permit projects for compliance with the California Electrical Code and the lighting requirements of the California Energy Efficiency Standards.

☐ **Engineering Review:** Reviews all projects to determine public improvement and grading permit requirements.

☐ **Environmental Analysis:** Provides interpretation on project related environmental issues based on the applicant's project description (note: it is usually not possible to determine the type of environmental document required during the preliminary review process). Determines need for site-specific survey and location of potential historical resources.

- ☐ **Facilities Financing:** Assesses Housing Impact, Facilities Benefit Assessment and Development Impact Fees.
- ☐ **Fire:** Reviews projects for occupancy classification where hazardous materials will be stored, fire sprinkler, smoke control regulations, and for compliance with the California Fire Code.
- ☐ **Geology:** Reviews projects for geotechnical compliance with the California Building Code and Land Development Code.
- ☐ **Historical Resources:** Applicants can seek early input from Historical Resources Board staff about whether the proposed modifications to designated or potentially historical sites are in compliance with the Secretary of the Interior's Standards. Submit information required in C.12 above, in addition to plans for the proposed modifications.
- ☐ **Landscaping:** Reviews projects for compliance with the Land Development Code Landscape Requirements.
- ☐ **Map Check:** Reviews Final Maps, Parcels maps, Lot Line Adjustments, Dedications, Easements, Certificates of Correction, Certificates of Compliance and other record drawings. Reviews applications for public right-of-way vacations and easement abandonments.
- ☐ **Mechanical:** Reviews projects for compliance with the California Mechanical Code and the California Energy Efficiency Standards.
- ☐ **Multiple Species Conservation Program (MSCP):** Reviews projects for compliance with the MSCP.
- ☐ **Noise:** Reviews projects for compliance with the Land Development Code and Title 24 noise transmission control requirements.
- ☐ **Open Space/Park Development:** Reviews all projects for open space dedication requirements and impacts to open space.
- ☐ **Planning Review:** Reviews all discretionary projects for compliance with land use and property development regulations of the Land Development Code and ministerial projects within Planned Districts and some overlay zones.
- ☐ **Street Lights/Traffic Safety:** Reviews ministerial projects for compliance with street lighting, traffic control and other traffic safety issues. Issues traffic control permits.
- ☐ **Structural:** Reviews projects for compliance with the California Building Code (e.g., means of egress, disabled accessibility, occupancy classification, type of construction, allowable areas, fire resistive construction, structural systems and design regulations).
- ☐ **Transportation Development:** Performs discretionary reviews and reviews traffic studies for parking and right-of-way requirements.
- ☐ **Wastewater:** Reviews discretionary projects for wastewater issues. Reviews ministerial grading and public right-of-way permits for impacts to wastewater facilities. Prepares Will-Serve letters (a commitment letter from the City of San Diego to provide wastewater services). Reviews/approves Sewer Studies.
- ☐ **Water:** Reviews discretionary projects for water issues. Reviews ministerial projects for grading and public right-of-way permits for water issues. Prepares Will-Serve letters (a commitment letter from the City of San Diego to provide water services). Reviews/approves Water Studies.

#### **E. CONSTRUCTION PERMITS PROJECT INFORMATION**

Respond to the following questions if your preliminary review will include issues involving construction permits, such as building, grading or public right-of-way permits.

1. Will the existing/proposed building be sprinkled? ..... ☐ Yes ☐ No
2. Will your project include hazardous materials? If yes, please complete and provide a Hazardous Materials Questionnaire (DS-3163) and the Hazardous Materials Information (FPB-500). ..... ☐ Yes ☐ No
3. Have you done a means of egress analysis? (If yes, provide plans.) ..... ☐ Yes ☐ No
4. Type of Construction (per CBC): Existing \_\_\_\_\_ Proposed \_\_\_\_\_
5. Occupancy Classification (per CBC): Existing \_\_\_\_\_ Proposed \_\_\_\_\_
6. Square footage of building: Existing \_\_\_\_\_ Proposed \_\_\_\_\_
7. Has the site been previously graded? ..... ☐ Yes ☐ No

8. Provide the earthwork quantities for proposed grading (cut, fill, import, export, in cubic yards):

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9. What are the proposed public improvements?

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**F. DEVELOPMENT PERMIT AND POLICY APPROVAL PROJECT INFORMATION**

Respond to the following questions if your preliminary review will include issues involving land use or property development regulations, such as subdivisions, use permits land use plan amendments, etc.

1. Which Community Planning area is the project located within? \_\_\_\_\_

2. Will the request include a Community Plan Amendment? ..... ☐ Yes ☐ No

If yes, please describe the amendment:

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3. What is the base zone of the project premise (included the name of the Planned District, if applicable)?

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4. Does the project site have any structures that are over forty-five years old? ..... ☐ Yes ☐ No

5. Could the premises be historically significant for any reason? ..... ☐ Yes ☐ No

If yes, please explain:

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6. Is your project located in an area of sensitive biological resources, the City's Multiple Habitat Planning Area (MHPA), a wetland area, etc? ..... ☐ Yes ☐ No

7. Will your project generate new storm water runoff? ..... ☐ Yes ☐ No

8. Will there be a request for Rezone? ..... ☐ Yes ☐ No

If Yes, what zone is proposed? \_\_\_\_\_

9. Proposed Parking Ratio: \_\_\_\_\_

10. List any deviation or variance requests:

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**G. SUGGESTED DOCUMENTS TO PROVIDE**

In addition to this completed questionnaire, the following materials may be necessary for distribution to the Preliminary Review Team. For Mandatory Preliminary Review for the Affordable/In-Fill Housing & Sustainable Expedite Program, see item H below.

1. Completed Parcel Information Checklist (DS-302) with Parcel Information Report provided at Development and Permit Information.
2. A site analysis which includes the following information:
  - a. Conditions and land uses surrounding the site.
  - b. Circulation system in the neighborhood.
  - c. Topography of the site and of neighboring property.
  - d. Drainage patterns.
  - e. Soil types.
  - f. Location and identification of existing vegetation.
  - g. Existing use of the site and the location and size of any existing structures.
  - h. Location of existing utilities (water, sewer, drainage).
  - i. View corridors to and from the site.
  - j. Known easements on and adjacent to the property.
3. A conceptual site plan of the proposed development on the site, with all property lines shown and dimensioned.
4. Preliminary elevations and sections, as needed, to explain the proposed development.
5. Existing and proposed contours.
6. Known issues unique to the site or the community.
7. Vicinity Map
8. Structural Calculations
9. Disabled Accessibility Plans
10. Geotechnical Report/Soils Report

**H. MANDATORY PRELIMINARY REVIEW REQUIREMENTS FOR THE AFFORDABLE/IN-FILL HOUSING & SUSTAINABLE BUILDINGS EXPEDITE PROGRAM**

In addition to the Preliminary Review Questionnaire, provide the following documents:

1. The submittal package for the appropriate development permit, as identified in the Project Submittal Manual, except the Public Notice Package.
2. The completed Affordable Housing Requirements Checklist (DS-530)
3. The full discretionary deposit amount will be required at the time of Mandatory Preliminary Review submittal, rather than the Preliminary Review deposit. Payment of the expedite fee is due upon formal submittal of the project.
4. The project will be required to proceed through the "Multiple Discipline Preliminary Review" with the "Preliminary Review Meeting" as described in this bulletin.
5. Any anticipated environmental studies.
6. A detailed list of known deviations requested (reference SDMC Section 143.0910).
7. A minimum of twelve (12) copies of the completed forms and documents referenced above, as well as any information you deem necessary for the review.